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FinancialPlanning

Wealthtech Weekly

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By Rob Burgess
Reporter

Artificial intelligence is being injected into practically every facet of our lives, often in the name of increased efficiency. But several experts I spoke with told me about instances when utilizing AI-powered tech made a simple task take much longer than it would have if they had just done the work themselves to begin with.

Have you experienced cases when AI turns out to be a huge time suck? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

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TOP STORIES

TECHNOLOGY

When AI shortcuts backfire on advisors

Need a general summary that doesn't require much detail? AI may save time. But if you want content that is nuanced and compliant, these experts say you may want to just do it yourself.

- **The 'granular' investing strategy with big tax savings for HNW clients**
  High net worth clients who want increased customization and tax-loss harvesting possibilities might benefit from direct indexing, but financial advisors say it isn't right for everyone.
- **Advisor confidence positive for the first time in six months**
  Many advisors expressed optimism that tariff-induced volatility was calming, but others said they are concerned about the long-term effects of the so-called Big Beautiful Bill.
- **Can luxury handbags make for valuable 'clutch' investments?**
  A rare handbag can be worth far more than retail to the right buyer, but some advisors caution against viewing them as a store of value.
- **Inflation again? How to get ahead of client concerns this time around**

Some analysts see inflation around the corner. Here's how to keep clients calm.

Read the latest in Wealthtech

PARTNER INSIGHTS FROM EMONEY

Asking the right questions is at the heart of every meaningful financial conversation

How do you know what to ask and when? This webinar will guide financial professionals through a three-part journey.

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